

Discounts – General information

A discount is a parameter defining a reduction in respect of a regular price. The system handles the mechanism of discount allocation in trade transactions.

In the system, it is possible to differentiate:

- [user discount](#)
- [document header discount](#)
- [item discounts](#)
- [bundle promotions](#)

On the basis of the above-mentioned discount types, a user can create discounts defining detailed conditions of their calculation.

The discounts are available from the level of tab *Sales* section *Discounts*.

The following buttons are available in *Discounts* button group:

- **Discount Types** – list of predefined item discount types, bundle promotions and document header discounts for which a user can define the order of their calculation.

Note

User discounts (including document header discounts) have calculation order determined by default and are not subject to any edition – they are always calculated as the last ones after item discounts and bundle promotions.

- **User** – list of system operators along with the maximum user discount granted them, that they can give to a customer when issuing a document, regardless of item discounts.
- **Discounts** – list of item discounts and bundle promotions

defined by an operator

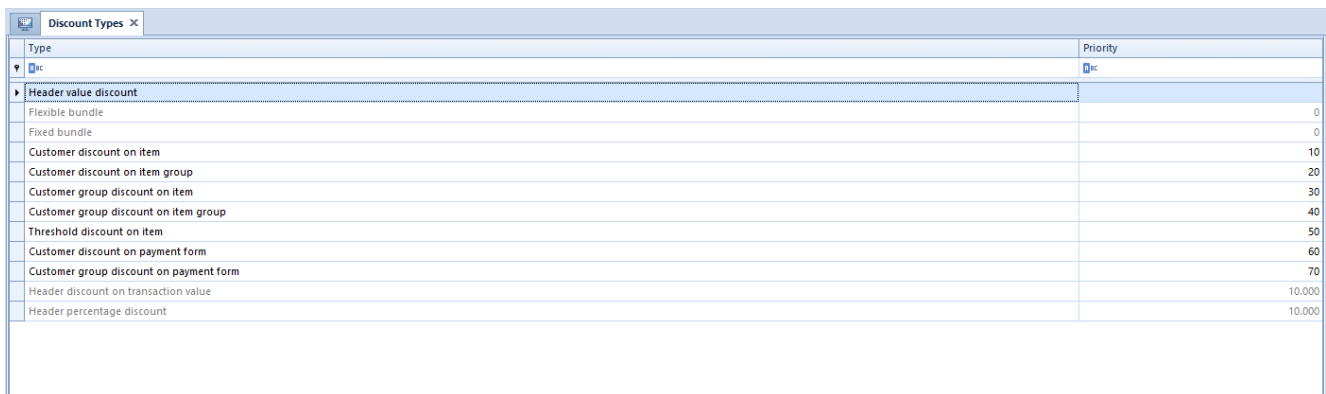
Principles of calculating discounts in the system:

- discounts are granted in document currency (if a discount is expressed in another currency, then it is recalculated into the currency of a given document at a rate binding on a given document)
- depending on VAT direction in a document, a discount is calculated:
 - on value/subtotal price – if a document is issued on subtotal
 - on value/total price – if a document is issued from total
- depending on the *Discount on Price* parameter on the item form, discounts are calculated from either a price or an item value of a document
- value-based discounts (amount-based discounts) as well as user discount on items are combined with other discounts always by the Add method
- the system takes into account the parameter of control: $\text{quantity} \times \text{price} = \text{value}$
- the system takes into account the minimum margin control – after calculating discounts, a price can be increased so as to fulfill the conditions of the minimum margin
- order of discount calculation:
 - line item discounts (item discounts) according to the order defined in the list of discount types
 - user discount (given directly on the line item of a document)
 - header percentage discount
 - header value discount
 - checking the control of minimum margin and control: $\text{quantity} \times \text{price} = \text{value}$
- the value of the whole document calculated on the basis of the item value of a document

Discount types

Discount types are models predefined in the system; on which basis a user can define discounts with specified conditions of their calculation.

From the level of tab *Sales* → *Discount Types*, a list of all item discount and header discount types is available, where a user can determine the order of calculation of item discounts and bundle promotions.



Type	Priority
Header value discount	
Flexible bundle	0
Fixed bundle	0
Customer discount on item	10
Customer discount on item group	20
Customer group discount on item	30
Customer group discount on item group	40
Threshold discount on item	50
Customer discount on payment form	60
Customer group discount on payment form	70
Header discount on transaction value	10.000
Header percentage discount	10.000

List of discount types

Two columns are available in the list

- **Type** – defines type of discount and indicates general criteria according to which the system calculates discount and which have to be specified in a detailed way by an operator defining a given discount.
- **Priority** – defined on discount type, affects setting a default priority for a newly added discount which determines the order of discount calculation (a discount with the lowest priority value is calculated as first). Exceptions include header discounts (percentage and value) and bundle discounts which are always calculated as the last ones.

Item discounts include the following:

- **Customer discount in item** – a special discount on a given item or several items is granted to a specified customer or several customers
- **Customer discount on item group** – a discount on item from a given group/groups of items is granted to a specified customer or several customers
- **Customer group discount on item** – a special discount on a given item or several items is granted to a specific group/groups of customers, e.g. partners of a company
- **Customer group discount on item group** – similarly as the described above
- **Threshold discount on item** – thresholds regarding the quantity of a purchased item/items and the amount of a discount for each threshold are defined, e.g. below 100 pcs of a given item – no discount, from 101 to 1000 pcs – 5% discount, over 1000 pcs – 7%
- **Customer discount on payment form** – defined for specific customer/customers on a given payment form
- **Customer group discount on payment form** – similarly as the *Customer discount on payment form*, but it is defined for a group/groups of customers

Bundle promotions include the following:

- **Fixed Bundle** – applied after adding specific items (creating a bundle) to a document, only in determined quantity or its multiplication
- **Elastic Bundle** – a global quantity or value threshold is determined after exceeding of which a discount is granted on items or groups of items indicated in a given bundle

Header discounts include the following:

- **Header percentage discount** – type of user discount, granted by a customer directly in the header of an

issued document and then divided into particular document items by the system; an operator has to earlier define if a discount is to be calculated with other discounts by adding or multiplying.

- **Header value discount** – type of user discount, similarly as in the header percentage discount, it is defined directly in the header of an issued document and divided by the system into individual document items, proportionally to their value.
 - **Header discount on transaction value** – discount granted depending on defined value thresholds. It can be granted both in the value and percentage form. A discount defined in Comarch ERP Standard will be calculated only in transactions processed in Comarch POS.
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User and document header discounts

User discounts are the discounts granted by an operator when a sales document is being issued. On the same document, an operator cannot grant a discount higher than the discount which has been assigned to him/her in the system.

A list of the users, along with the maximum discount value assigned to them, is available from the level of the tab *Sales* → *(Discounts)* → *User Discounts*.

User discounts can be expressed in percentage or value (amount) form and they are calculated:

- by granting a discount on a specified document item (manual change of price, discount or value of an item on document item; hereinafter referred to as a user

discount)

- to the whole document, the so-called document header discount

Before defining a discount, it is necessary to create an account for a specified user (*Configuration* → *Company Structure* → *Operators*) and assign an employee that account. Then, from the level of the tab *Sales* → (*Discounts*) *User Discounts*, define the maximum amount of a discount that can be granted by the user.

User discount and header value discount are always calculated by adding (they sum up).

Header discounts are available on SI, R, SOR, SO and SQ.

Header percentage discount

The percentage header discount is defined on the discount list as the only one from the user discounts (*Sales* → *Discounts*). However, its definition is subject to minor modifications – a user can change its name and a method of combining with other discounts.

A percentage discount can be granted both before adding items to a document and after it. Depending on the settings of the method of combining with other discounts on the the definition of a header percentage discount, such a discount:

- reduces the value of an item after discount by the header percentage discount and after reducing the value, recalculates the price and the effective item discount – option *Multiply*

Example

An item discount *Customer discount on item* has been defined in the system – items LAC001 and K00020, customer Shoes4You, discount value 4%. Price of items LAC001– 10 USD, K00020– 20 USD. In the definition of the discount header, the parameter

responsible for the method of combining with other discounts is set on value *Multiply*.

1. An invoice for the customer Shoes4You has been issued. VAT direction on a document is calculated from subtotal, whereas discounts are calculated from a price.

2. A discount of 2% (0.0200) has been entered in the document header

3. While adding the item LAC001 (quantity 1 pcs), item discounts of this item are calculated as first

LAC001: $1 * (10 \text{ USD} * (1 - 4\%)) = 9.6 \text{ USD}$

4. Then the header percentage discount of 2% is calculated

LAC001: $1 * (9.6 \text{ USD} * (1 - 2\%)) = 9.41 \text{ USD}$

5. Item value LAC001 after discounts, amounts to 9.41 USD

6. Calculating price and effective discount

LAC001: price 9,41 USD / 1 = 9,41 USD; effective discount $(10 \text{ USD} - 9,41 \text{ USD}) / 10 * 100 = 5,9\%$

- adds the header discount to the item discount and will finally calculate an item price, depending on the parameter settings *Discount on price* – option *Add*

Example

An item discount *Customer discount on item* has been defined in the system – items LAC001 and K00020, customer Shoes4You, discount value 4%. Price of items LAC001– 10 USD, K00020– 20 USD. In the definition of the discount header, the parameter responsible for the method of combining with other discounts is set on value *Add*.

1. A sales invoice is issued. VAT direction on a document is

calculated from subtotal, whereas discounts are calculated from a price.

2. A discount of 2% (0.0200) has been entered in the document header

3. While adding the item LAC001 (quantity 2 pcs), item discounts of this item are calculated as first

LAC001: $2 * (10 \text{ USD} * (1 - 4\%)) = 2 * 9,6 \text{ USD} = 19,2 \text{ USD}$

4. Then the header percentage discount of 2% is calculated

LAC001: $2 * (10 \text{ USD} * (1 - (4\% + 2\%))) = 2 * 9,4 \text{ USD} = 18,8 \text{ USD}$

5. Item value after discounts 18,8 USD

6. Calculating price and effective discount

LAC001: price $18,80 \text{ USD} / 2 = 9,40 \text{ USD}$; effective discount $(10 \text{ USD} - 9,40 \text{ USD}) / 10 * 100 = 6\%$

If the header percentage discount has been granted after calculating the value discount, the system will recalculate this discount on the items in accordance with the standard order – item discounts, a user discount on item, a header percentage discount and a header value discount.

Header value discount

After entering the amount of header value discount in the document header, the system divides this amount into document items proportionally to their values.

When adding items to a document, the value discount is calculated:

only on the items which were added to the document before entering the discount

if a user enters the header percentage one more time, then, the system recalculates all discounts for each item according to the standard order

The minimum margin control may lead to the situation that the item value cannot be reduced by the proportional part of the header percentage discount of this item. In such a case the system will try to divide this amount into the remaining items on a document.

In case of deleting an item from a document on which a header value discount was calculated, the system verifies whether the total of header value discount amounts on the other items equal to the amount specified in the header.

Note

A user discount and a header value discount are always calculated by adding.

Example

In the system, there are two items:

- LAC001, price from a price list (regular amount) = 12.20 USD
- K00020, price from a price list (regular amount) = 20.00 USD

A SI was issued for 1 unit of the item LAC001 and 1 unit of the K00020:

- LAC001, 1 pack * 12.20
- K00020, 1 pack * 20.00

SI document value is 32,20 USD. A header value discount was granted in the amount of 30.00 USD. Values of the items change as follows after calculating a discount:

- LAC001, discount value 11.37 (93.20%), discounted price 0.83 USD
- K00020, discount value 18.63 (93.15%), discounted price

1.37 USD

Next, the quantity of the LAC001 was decreased on the document item from 1 pack to 0.5 pack. As a result, the system does change neither the discounted price (the price 0.83 USD will remain) nor the total amount of the header value discount (11.37 USD), it will just add a negative user discount to the items amounting to -5.69 USD so as to equalize the total discount to that from before the changed item quantity. This way it can be observed in the discount structure that the item was still modified after the header value discount had been calculated.

[/alert] The header discount value is calculated only on these items which have been added on a document before this discount has been set. If a user sets a header value discount on a document and then adds new items, the system does not divide this discount one more time and will not take it into account on all items added as new. [/alert]

Header discount on transaction value

Header discount on transaction value allows for calculating a discount which depends on the value of the whole document. The discount is granted to a customer if the value of the transaction reaches one of defined thresholds.

Note

A user can only define a header discount on transaction value which, upon synchronization to Comarch POS, can be used in a document.

A step necessary defining a discount is defining the value of granted discount for at least one threshold. A user determines the value/percentage of a granted discounts, its currency and a threshold defining its effectiveness.

When creating a header discount on transaction value, apart from the standard fields available in the discount definition

<<item discounts>>, a user can also define additional parameters determining the method of calculating document value:

- Include items not subject to discounts – selecting this parameter allows for including into transaction value items which have parameter *Subject to discounts* unchecked on item form
- Include bundles not subject to header discounts – selecting this parameter allows for including into transaction value bundle promotions for which the parameter *Include header discounts* is unchecked in discount definition

Value From	Percentage Value	Discount Value	Currency
10,000	<input checked="" type="checkbox"/>	10,00	[unselected]

Header discount on transaction value

Bundle promotions

Bundle promotions are used in order to increase sales of in low demand with those which are most frequently purchased. With the use of “bundles” a user can define a promotion in

which, for example, a purchaser, upon purchasing an item from specific group, receives a freebie. Combining bundle promotions with header discounts allows for maximum increase of sales of the whole assortment.

It is possible to define two types of bundle promotions:

- **fixed bundle**
- **flexible bundle**

On their basis it possible to define promotions such as:

- a customer receives a freebee when purchasing any item/items from the list
- a customer is granted discount on particular items when purchasing specific quantity of items
- a customer is granted discount on particular items when purchasing items of specific value
- a customer is granted both discount on particular items and receives a freebee upon satisfying specific promotion conditions

Note

If a bundle promotion is defined for whole item groups, their list is limited to those groups only, which belong to a classification category with selected parameter *Assign items multiple times*

to item groups.

Calculation bundles in a document

In definitions of *SQ*, *SO*, *Sor*, *SI* and *R* is available parameter *Handle bundle promotions* which specifies method of calculating discounts: A user can select one of two options:

- **Automatically when adding items** – upon selecting this option, bundle discounts are calculated when adding items to a document

- **Manually** – bundle discounts are calculated only after clicking on the button [**Bundle Promotions**]

When in document definition (SQ, SO, SOR, SI, R) the parameter *Handle bundle promotions* is unchecked, on a given document type, the system:

- does not verify assignment of items to a bundle when document items are added
- does not calculate discounts when confirming or modifying data in a document

In the column N., bundle promotions are marked with icons informing about:



– an item for which there are bundle promotions defined



– fulfilling all conditions defined in the definition of discounts and calculating a bundle discount

In case bundle discounts are calculated manually, after selecting the button [**Bundle Discounts**], a user can select one of the following options:

- **Calculate discounts** – bundle discounts are calculated in accordance with conditions defined for each bundle.
- **Delete Discount** – allows for deleting a discount from a document This option is active if in a document there is a bundle discount calculated.

Combining bundle promotions and header discount

If bundle promotions have been calculated on a document, then header discounts are calculated on items which:

- are not included in bundle discount
- are included in a bundle promotion with parameter

Include header discount checked and are not marked as freebies

Fixed bundle

Fixed bundle is a promotion which is calculated only in case if all items defined as bundle elements are added to a document in a specified quantity or in a quantity being multiplication of it.

The following fields of the header of this discount are different compared to other item discounts:

- **Define Sort of Discount** – depending on selected option, it allows for defining discount:
 - for particular bundle items – *On item/freebie form*
 - for an entire bundle, dividing a discount proportionally to all items – *In discount header*

Note

Discounts with selected option *In discount header* are not calculated on documents issued in *Comarch ERP Standard*.

After selecting *In document header* option:

- field *Calculate Discount On* is presented, which allow for specifying whether a discount is to be calculated on:
 - *Basic Items*, which results in hiding sections *On item/freebies*
 - *Additional Items/Freebies* – after selecting this options items added in section *Items* constitute discount conditions. If these conditions are

fulfilled, a discount on items added in section *Additional items/Freebies* is calculated.

Note

Items selected in section *Additional Items/Freebies* have parameter *Required* checked automatically.

- field *Distribute Discount To Bundle Items* assumes the value *Proportionally* (without the possibility of changing it)
- field *Sort of Discount* becomes available in discount header. It allows for selecting one of the following discount sorts:
 - *Percentage*
 - *Value*
 - *Package Fixed Price Subtotal* – (option available only for fixed bundles), allows for defining final subtotal value of a bundle
 - *Package Fixed Price total* – (option available only for fixed bundles) allows for defining final value of a bundle
- **Currency** – allows for defining currency of a given discount

Tab Items on fixed bundle form

The tab *Items* is divided into two sections:

- **Items**
- **Added Items/Freebies** (available when option *Define Sort of Discount: On item/freebie form* is selected)

After selecting items or item group, a user should define:

- **Sort of Discount** – drop-down list with the following options:
 - Percentage Discount
 - Fixed Price Subtotal
 - Fixed Price Total
- **Quantity** – required quantity of items which must be added to a document for a promotion to be calculated. In case of adding greater quantity of item than indicated in this column, document items are divided into quantity resulting from the promotion and quantity not subject to the promotion.
- **Minimum Item Quantity** – field available for modifying only for a row regarding item group, defines the minimum quantity of different items from a given item group which must be added in order to be able to calculate a

discount on a document.

- **UOM** – unit of measure of an item for which a given discount is to be valid
- **Classification** (column hidden by default) – field filled in only for a row regarding item group. It displays classification do which belongs a given group.
- Additionally, in the section *Added Items/Freebies*, the following column is available:
- **Include header discounts** – column available after selecting parameter *Include header discounts*. Allows for selecting method of distributing discount to bundle items

Value of the parameter Include header discounts	Method of distributing discount to items	Method of calculating discount
unchecked	None	Successive discounts are not calculated on an item marked as freebie.
checked	None	Successive discounts may be calculated on a freebie according to their definition; order and priorities.
checked (without the possibility of unchecking it)	Proportionally	Successive discounts may be calculated on a freebie according to their definition; order and priorities.

Note

For the setting *Distribute Discount To Bundle Items: Proportionally* discounts are also calculated on items with discount *Fixed Price* calculated.

Example

A fixed bundle with a proportional distribution of discounts to item *Buy purse and an accessory – pay only for the purse.*

The following items are added to invoice:

- 1 pcs of item *BAG002NAVONE* – regular price 100 USD
- 1 pcs of item *EAR200* – regular price 90 USD

A discount corresponding to the value of the item *EAR200* is distributed according to the definition, that is proportionally to all document items. As a result, discounted prices of the items are as follows:

- *BAG002NAVONE* – discounted price: 52.63 USD
- *EAR200* – discounted price: 47.37 USD

Additionally, in section *Additional items/Freebies*, the following column is available:

- **Required** – parameter allowing for marking an item as a freebie required for a bundle discount to be calculated.

Note

In case at least one freebie has been marked as required on the list, the system, in order to calculate a bundle discounts, verifies whether at least one freebie occurs in the list of document items.

If none of freebies is marked as required, the system calculates discounts even if freebee is not included in a document.

- **Least Expensive** – option available in case of selecting a group of items in the section *Freebies*. Its selection determines calculation of a discount for an item with the lowest price/value.
- **Most Expensive** – option available in case of selecting a group of items in section *Freebies*. Its selection determines calculation of a discount for an item with

the highest price/value.

In order to save a fixed bundle, it is necessary to:

- add at least one basic item
- define quantity for all added items in the list *Items* and *Added Items/Freebies*
- attach a customer
- define center

Example

Bundle promotion of *Fixed Bundle* type has been defined.

The following item is added in section *Items*:

- item 500300047: quantity 2 pcs, sort of discount – percentage discount 10%

The following item is added in section *Added Items/Freebies*:

- item 500300050: quantity 1 pcs, sort of discount – fixed price 1 USD

The following items are added to the document: 500300047 quantity 3 pcs and 500300050 quantity 2 pcs

Upon calculating the promotion, discounts in the document are as follows:

- 500300047 2 pcs 10%
- 500300050 1 pc 1 USD
- 500300047 1 pcs – without discount
- 500300050 1szt. – without discount

In case of purchasing 4 pcs of item T1 and 2 pcs of item T2, total quantity of items would constitute multiplication of value from *Minimum Item Quantity* field defined in the discount, so a user could be granted the discount and 2 freebies (as that would be equivalent to two bundles).

Flexible bundle

With the use of a flexible bundle, a user can determine deductions for items in case their sales volume achieves a specified threshold (value or quantity).

For each global threshold it is possible to define different discount conditions for selected items and add a freebie if bundle threshold is satisfied.

Flexible bundle thresholds

Flexible bundle is defined the same way as fixed bundle. In case of this type of promotion, in the tab *Items*, there is an additional section *Threshold* which allows for defining quantity and value thresholds (so-called global thresholds) regarding the entire promotion.

The screenshot shows a 'Thresholds' section with a 'Type' dropdown set to 'Quantity'. Below this is a table with two columns: 'Quantity From' and 'Min. Item Quantity'. The 'Quantity From' column has a value of 1,000 and a small upward arrow icon. The 'Min. Item Quantity' column has a value of 1,000. Above the table, there is a prompt: 'Drag the column header here to group by that column'. The table has a header row and one data row. The data row has a small downward arrow icon on the left side of the 'Quantity From' cell.

Quantity From	Min. Item Quantity
1,000	1,000

Section Thresholds on flexible bundle form

A column *Threshold Type* is available in section *Items*. Value defined in this field at the level of promotion items can be

different from the global threshold. In this case, for a bundle to be calculated, a document must satisfy both all the specified thresholds at the item level, as well as global threshold defined for entire promotion.

In order to be able to save a flexible bundle, it must satisfy the same conditions as in the case of fixed bundle. Additionally, the system verifies whether the minimum item quantity/value defined in the threshold is not lower than the total of minimum item quantities/values specified for promotion items (section *Items*). In such a case, an appropriate message informing about inconsistency of defined thresholds is displayed.

In the case of flexible bundle promotions, it is important to complete:

- Values of global thresholds – section *Thresholds*
- Values of thresholds on individual items – column *Threshold Value* (that is, item quantity which must be added to a document)
- Adding *freebies* to selected thresholds

Example

The following bundle has been defined:

The screenshot displays two main sections: 'Thresholds' and 'Items'.

Thresholds Section:

- Type: Value
- Value From: 2,000,000
- Min. Item Quantity: 1,000

Items Section:

Item/Group C...	Item/Group N...	Sort of Disco...	Threshold Type	Threshold Val...	Classification	Discount Value	Min. Item Qua...
a1	a1	Percentage	Value	0,0000		0,00%	0,0000
a2	a2	Percentage	Value	0,0000		0,00%	0,0000
a3	a3	Percentage	Value	0,0000		0,00%	0,0000

Additional Items/Freebies Section:

Item/Group C...	Item/Group N...	Min. Item Qu...	Required	Threshold Val...	Sort of Disco...	Discount Value	UOM
a4	a4	1,0000	<input checked="" type="checkbox"/>	1,0000	Percentage	0,00%	All

Value From	Min. Item Quantity
2.000,0000	1,0000
3.000,0000	1

Item/Group C...	Item/Group N...	Sort of Disco...	Threshold Type	Threshold Va...	Classification	Discount Value	Min. Item Qu...
a1	a1	Percentage	Value	0,0000		0,00%	0,0000
a2	a2	Percentage	Value	0,0000		0,00%	0,0000
a3	a3	Percentage	Value	0,0000		0,00%	0,0000

Item/Group C...	Item/Group ...	Min. Item Qu...	Required	Threshold Va...	Sort of Disco...	Discount Value	UOM
a5	a5	1,0000	<input checked="" type="checkbox"/>	1,0000	Percentage	0,00%	All

Depending on document value, the system applies:

First threshold – if to a document:

- is added any item a1, a2, a3 with a value of 2000 USD at least

Or

- is added combination of items a1, a2, a3 and their total value is 2000 USD
- is added item a4

Calculated discount updates the value of the item a4 to 0 USD

Note

Since items a1, a2, a3 have threshold value defined as 0, adding all three items to a document is not required in order to fulfill the bundle. It means that the bundle will be calculated even after adding one of the items if it fulfills requirements of threshold value.

Second threshold – analogical case, after exceeding the value of 3000 USD, item a5 will be updated as a freebie.

Discount structure

Discount structure is a tool which enables user to verify discounts calculated on a document item and at the same time the final item price on an item of a document for released items.

Apart from the standard discounts, the value or the price of an item (and thereby a discount) can change as a result of:

- **minimum margin control**
- **control: quantity * price = value** (difference resulting from rounding)

Additionally, the following factors affect the method of discount calculation:

- setting of the method of combining discount in discount definition – *Add* or *Multiply*
- parameter *Discount on Price* parameter on item form
- VAT direction in a document

Item:	LCDM-001									
Quantity:	1,0000	Regular Price (S):	900,00 EUR	Discounted Price (S):			765,00 EUR			
Discount:	15,00 %	Regular Value (S):	900,00 EUR	Discounted Value (S):			765,00 EUR			
Discounts										
No.	Type	Name	Combining M...	Discount %	Total Discou...	Discount Value	Value Before ...	Value After Dis...		
1	User discount	User discount	Add	15,00%	15,00%	135,00	900,00	765,00		
Header Discount										
Discount Type						Discount Value				
Header percentage discount						9,00				
Header value discount						0,00				
▶ Remaining user discount						126,00				
<input checked="" type="checkbox"/>										

Discount structure window

The structure of granted discount is available for documents:

SI, R, SOR, SO and SQ. It is available in the form of an additional window opened from the level of a document or as an expanded section from the level of a document item form (tab *Calculation*) It presents detailed list of calculated discounts for a currently selected item. The order of discounts on the list is compliant with the sequence of their calculation on an item.

A user can change item selection without closing a window with discount structure.

The preview of an item structure depends on permission *Access to discount structure* in operator group. For users who do not have permission *Access to discount structure* granted, structure preview is not available.

Influence of the parameter *Control: Quantity * price = value* and *Minimum margin control*

- If item value does not change after control: $quantity * price = value$, but total discount in discount structure changes – no entry is added.
- If item value changes after control: $quantity * price = value$, the system registers such a change in the discount structure.
- If an item is modified after minimum margin control, the system also adds an appropriate entry in the discount structure.

Coupon-based promotions

Coupons allow for calculating a percentage or value discount

for purchased items by using an appropriate code.

Note

In Comarch ERP Standard, a user can only define discount coupons which are later synchronized to Comarch POS where they can be used on a document.

Definition of coupons

From the level of the tab *Sales* → *Coupons*, a user can add and verify coupons existing in the system. The list contains basic information about coupon-based promotion, such as:

- **Name** – field presenting name of a given coupon-based promotion, it is not a unique value
- **Active** – information regarding activity of a given coupon
- **Effective From** – indicates a date from which a given coupon is valid
- **Effective To** – indicates a date to which a given coupon is valid
- **Calculated Discount** – name of discount associated with a coupon
- **Discount Type** – type of discount associated with a coupon
- **Schedule-Limited** – informs whether coupon-based discount is associated with a schedule

In order to add new coupon, it is necessary to click on button **[Add]** placed over the list.

The following fields and parameters should be completed on the form:

- **Name** – obligatory field, allows for entering any character (letters and/or numbers) sequence corresponding to the name of the object, it is not a unique value
- **Symbol** – alphanumeric code on the basis of which a

discount code is defined If in the field *Symbol* value DISCOUNT is entered, then field *Code* for a new discount code is automatically completed with the same value. After adding subsequent discount code, the following value will be set: DISCOUNT1

- **Numbering Scheme (Configuration Tool)** – non-mandatory field After selecting button [...] a list of configuration tools appears, limited to configuration tools based on the object *Coupon*. Only active configuration tool can be set as numbering scheme. On its basis a discount code in the field *Code* is created.
- **Discount** – this field allows for associating an item discount (for which, in its definition, the parameter *Coupon-based promotion* is checked) and a header discount on transaction value with a coupon (discount name is displayed)
- **Discount Type** – indicates the type of discount associated with a coupon (type retrieved from details of the associated discount)
- **Customer in Document** – value in this field can be selected only after discount is first associated with a coupon. Defined value determines whether a discount code can be used in a document. Depending on associate discount type, the following options are available:
 - *Non-mandatory* – the system does not control the consistency of customers between a document and a customer associated with a discount code.
 - *Mandatory* – a discount code cannot be added to a document in which an *Undefined* customer has been selected.
 - *Mandatory and consistent with discount code* – the system controls consistency of customers between a document and a customer associated with a discount code.
- **Code usage limit** – checking this parameter allows for specifying how many times a given discount code can be used in a document. Moreover, a user should define the

nature of a discount with the following options:

- *Global* – it can be used a specified number of times in the entire system
- *Center* – it can be used a specified number of times in particular centers
- *Customer* – it can be used a specified number of times for a given customer
- **Effective From** – indicates a date from which a given coupon is valid
- **Effective To** – indicates a date to which a given coupon is valid
- **Schedule-limited** – parameter not available for editing, it is automatically checked upon attaching a schedule to a coupon.
- **Do not use other coupons** – checking this parameter blocks the possibility of adding several discount codes to a document.

Type of discount associated with a coupon	Type of object possible to assign	Available options under <i>Code usage limited to</i>	Available options under <i>Customer in Document</i>
<ul style="list-style-type: none"> ▶ None – a coupon has not been associated with any item discount 	<ul style="list-style-type: none"> ▶ No association ▶ Customer ▶ Customer group 	<ul style="list-style-type: none"> ▶ Unlimited <ul style="list-style-type: none"> ▶ Global ▶ Center ▶ Customer 	<ul style="list-style-type: none"> ▶ Non-mandatory (default value) ▶ Mandatory ▶ Mandatory and consistent with discount code
		<ul style="list-style-type: none"> ▶ Customer 	<ul style="list-style-type: none"> ▶ Mandatory ▶ Mandatory and consistent with discount code
<ul style="list-style-type: none"> ▶ Customer discount on item ▶ Customer discount on item group 	<ul style="list-style-type: none"> ▶ No association ▶ Customer 	<ul style="list-style-type: none"> ▶ Unlimited <ul style="list-style-type: none"> ▶ Global ▶ Center 	<ul style="list-style-type: none"> ▶ Non-mandatory ▶ Mandatory ▶ Mandatory and consistent with discount code
		<ul style="list-style-type: none"> ▶ Customer 	<ul style="list-style-type: none"> ▶ Mandatory (default value) ▶ Mandatory and consistent with discount code
<ul style="list-style-type: none"> ▶ Customer group discount on item ▶ Customer group discount on item group 	<ul style="list-style-type: none"> ▶ Customer group 	<ul style="list-style-type: none"> ▶ Unlimited <ul style="list-style-type: none"> ▶ Global ▶ Center ▶ Customer 	<ul style="list-style-type: none"> ▶ Mandatory and consistent with discount code
<ul style="list-style-type: none"> ▶ Fixed bundle ▶ Flexible bundle ▶ Threshold discount on item 	<ul style="list-style-type: none"> ▶ No association ▶ Customer ▶ Customer group 	<ul style="list-style-type: none"> ▶ Unlimited <ul style="list-style-type: none"> ▶ Global ▶ Center 	<ul style="list-style-type: none"> ▶ Non-mandatory (default value) ▶ Mandatory ▶ Mandatory and consistent with discount code
	<ul style="list-style-type: none"> ▶ Customer ▶ Customer group 	<ul style="list-style-type: none"> ▶ Customer 	<ul style="list-style-type: none"> ▶ Mandatory (default value) ▶ Mandatory and consistent with discount code

Tab Discount Codes

In subtab *Codes*, a user can define a new discount code which is automatically associated with a currently edited coupon. To add a new discount code, it is necessary to select **[Add]** button.

Selecting the button **[Add]** adds a new row to the list, where the basic data regarding created discount code will be

displayed:

- **Code** – mandatory field, code assigned automatically on the basis of an associated configuration tool or, if it does not exist, on the basis of the *Symbol* field. This field should contain a unique value in reference to defined codes with *Inactive* and *Active* status.
- **Valid From** – the value of this field is retrieved from the definition of a discount, with a possibility of changing it. The date cannot be earlier than the date indicated in the coupon definition.
- **Valid To** – the value of this field is retrieved from the definition of a discount, with a possibility of changing it. The date cannot be later than the date indicated in the coupon definition.
- **Status** – discount code status. By default, it is set to *Inactive*, with the possibility of changing it to: *Active* – a coupon can be used in a document, *Blocked* – blocks the possibility of using it in a document.
- **Customer/Customer Group Code** – field allowing for associating a customer/customer group with a discount code. In case, when adding a new discount code, one of the following options has been selected: for *Group*/for *Customer* in selected group/for *Customer*, the field is completed automatically, with the possibility of changing it.
- **Customer/Customer Group Name** – field provided for information purposes, displays name of the associated customer/customer group
- **Source** – indicates method of creating a discount code. In case a code was added manually or imported from file, the following option is set: *Added manually*. If a discount code was generated on the basis of a document, the number of that document is presented.
- **Note** – in this field it is possible to enter additional notes to the added discount code

Codes Usage Count								
Drag the column header here to group by that column								
	Code	Valid From	Valid To	Status	Customer/Custo...	Customer/Cus...	Source	Note
	BC	BC	BC	=	BC	BC	BC	BC
▶	DISCOUNT	29/06/2020		Inactive			Added manually	
	DISCOUNT1	29/06/2020		Inactive	Customers	Customers	Added manually	
	DISCOUNT2	29/06/2020		Inactive	Customers	Customers	Added manually	

List of discount codes

If option *Mandatory and consistent with discount code* is selected in field *Customer in Document*, then it is possible to add discount codes in a single batch for selected customers/customer groups (the available options of batch addition depends on discount type).

Subtab *Usage Count* presents basic information about documents in which a given discount code was used. It is always the first source document in which a given discount code was used. In the path *SO → SI → SOR*, a sales order number is only presented.

In tab *Centers*, a user indicates organizational units of a company which can grant a given discount. It is possible to attach here only centers of e-Shop type or a center attached to a POS workstation.

In tab *Schedules* it is possible to attach a previously defined schedule to a given discount.

Note

It is possible to attach here only centers of e-Shop type or a center attached to a point of sale.

Promotion Terms – field allowing for introducing additional description of a promotion